

<b>STARS USER MANUAL.....</b>	<b>1</b>
<b>USING THE WEB VENDOR MAINTENANCE APPLICATION .....</b>	<b>1</b>
<b>INTRODUCTION .....</b>	<b>1</b>
<b>CREATING A VENDOR FORM.....</b>	<b>2</b>
<b>COMPLETING THE VENDOR FORM .....</b>	<b>2</b>
SUBMITTER INFORMATION.....	2
ACTION INFORMATION .....	4
VENDOR INFORMATION .....	7
TRACKING INFORMATION.....	9
SAVE, SEND FOR APPROVAL, OR PRINT THE FORM.....	9
<b>VIEWING VENDOR FORMS IN PROGRESS (BY AN AGENCY).....</b>	<b>10</b>
<b>E-MAIL NOTIFICATION.....</b>	<b>11</b>
<b>TROUBLESHOOTING WEB BROWSER REQUIREMENTS .....</b>	<b>12</b>
<b>AGENCY RESPONSIBILITIES .....</b>	<b>12</b>
<b>SCO RESPONSIBILITIES.....</b>	<b>13</b>

# STARS USER MANUAL

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## USING THE WEB VENDOR MAINTENANCE APPLICATION

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### INTRODUCTION

The Web-based Vendor Maintenance application was developed to replace the Vendor 21 form and to eliminate paper processes and the time necessary to deliver them. However, it is still necessary to obtain a completed Substitute Form W9 and to complete the online form.

Any State employee who can log on to the Idaho State Controller's Office applications <http://www.sco.idaho.gov/> to use, for example, Online Reporting or I-Time, can access to Web Vendor Maintenance to submit an online form to the SCO. SCO personnel will then review the form and will request verification from the Internal Revenue Service (IRS) that the vendor name and number combination submitted matches either IRS or Social Security Administration (SSA) information.

After completing these reviews and verifications, the vendor information will be added to STARS or will be returned to the originating agency employee for correction or for additional information. The online form comments section provides for communication between SCO personnel and agency employees.

NOTE: The Vendor Maintenance application does not add EFT information to new or existing vendors. See the [Electronics Funds Transfer](#) chapter for additional information on adding EFT information to a vendor.

## CREATING A VENDOR FORM

To create a vendor form, and then do the following:

1. Click **Vendor Maintenance**. On the **Vendor Maintenance** screen, you can select:
  - **Create a Vendor Form** – Select this to create a new vendor maintenance form. See the [Create a Vendor Form](#) section for more information.
  - **View Vendor Forms in Progress** – Select this to view the progress of previously created or submitted vendor maintenance forms.

The screenshot shows the 'Idaho State Controller's Office Vendor Maintenance' web application. It has a teal header with the title. Below the header, it says 'Welcome to the State of Idaho's Online Vendor Maintenance Site.' There is a section titled 'Please select one of the following actions:' with two buttons: 'Create a Vendor Form' and 'View Vendor Forms in Progress'. At the bottom, there is a link for 'Vendor' information and two buttons: 'Applications' and 'Log Off'.

2. Click **Create a Vendor Form**.
3. Complete the **Vendor Form** (see below).
4. Click **Send for Approval**.

You will receive an e-mail notification of the action when SCO has verified, reviewed, approved and loaded the information into STARS.

## COMPLETING THE VENDOR FORM

After obtaining a Substitute Form W9 from a vendor, complete the Vendor Form. A number of the fields, or data elements, are required and are identified on the form with a red asterisk. Below is a description of the form.

### SUBMITTER INFORMATION

The screenshot shows the 'STATE OF IDAHO - STARS VENDOR FORM'. At the top, there are three buttons: 'Close', 'Save Draft', and 'Send for Approval'. Below the buttons, the title 'STATE OF IDAHO - STARS VENDOR FORM' is centered. The form is divided into sections. The first section is titled '\*Required Fields' in red. Below this, there is a section titled 'Submitter Information:'. This section contains several fields: 'Date of Request' (11/26/2007), 'Agency Code' (140), 'Agency Name' (CONTROLLER), 'Contact Name' (JAMES CARTER), '\*Phone Number | Ext' (with two input boxes), and '\*Email Address' (with a single input box). The fields are arranged in a table-like structure with alternating light blue and teal backgrounds.

<b>Data Elements</b>	<b>Description</b>
Date of Request	The date will be the current system date and cannot be entered or changed.
Agency Code	The three digit agency code is automatically filled in based on your user name and agency code you entered on the logon screen.
Agency Name	The agency name is automatically filled in based on your user name and agency code you entered on the logon screen.
Contact Name	The contact name is automatically filled in based on your user name and agency code you entered on the logon screen.
Phone Number   Ext	Your agency telephone number or contact telephone number is required by the application. If applicable, include your extension number. The extension number is an optional field.
Email Address	<p>Enter your State of Idaho e-mail address. This is used to notify you when the form has been approved and the vendor number loaded into STARS, additional information is needed, or the form has been disapproved.</p> <p>The e-mail generated by the application will have a sender of either IPOPS1 or IPOPS2 with a subject line that starts with “The previously sent Vendor Form...”</p>

## ACTION INFORMATION

Action Information	
*Action	ADD NEW VENDOR ▾
*Vendor Number	Suffix
*Vendor Type	I - Individual/sole proprietor (1099 Ind = Y) ▾
*Vendor Status	0 - New/active vendor (requestor) ▾
Chg/W-9 Agency	140
*1099 Name/Addr	Blank ▾
*Sort Sequence	
SS EIN Number	Suffix
*1099 Indicator	Y ▾
Web RA Indicator	Blank - No access ▾

Data Elements	Description
Action	Click on the down arrow and select the appropriate action for this form. Available actions are as follows:  Add a new vendor Add a new suffix Change Name/Addr Change Number
Vendor Number	Enter the nine-digit Social Security Number (SSN) or Employer Identification Number (EIN) on the Substitute form W9.
Suffix	Enter the two-character suffix number. When adding a new vendor number, this should be 00. If the vendor number already exists, this should be the next consecutive number. You can recall the vendor number on the 2N screen in STARS to see if the vendor exists or to see what suffix numbers are already in use.
Vendor Type	Select the acceptable 1099 Indicator for each of the vendor types:  I – Individual/sole proprietor.  C – Corporation. Inc. or Corp. is usually in the name.  P – Partnership. Non-corporation businesses that are identified either in the name or on the Substitute Form W9 as being a partnership.  G – Government. Federal, State, and Local Governments.  N – Non-profit. Non-profit organizations.  O – Other. Miscellaneous organizations that do not fit any of the other listed classification.  E – Idaho State Employee (must match EIS information).

Data Elements	Description
Vendor Status	<p>Click the down arrow and select the appropriate vendor status:</p> <p>0 – New / Active - Use when setting up new vendors.</p> <p>1 – Inactive Number - Use when a vendor has quit a business, when the business is sold, or when merged with another business. The 1099 system will send the 1099-MISC to the vendor under this number and name. Also used for inactivating 1099 MISC rejections identified by the IRS. These vendors must submit a new W9 that the SCO will verify with the IRS or SSA.</p> <p>2 – Inactive Number - Use for a vendor number correction or a company merger when the tax liability for both of the numbers remains with the same entity. The 1099 system generates a 1099-MISC under the new number that includes data from the old number.</p> <p>Requires that the SS EIN Number/Sfx is different from the Vendor Number.</p> <p>STARS requires that the new vendor number/suffix must be in STARS before the number can be used in the SS EIN NUMBER field.</p> <p>3 – Lien/Garnishment - Used by the SCO personnel only. The vendor is still active and can be paid, but the SCO will pull the warrant and re-issue it to the entity requesting the Lien/Garnishment. If the vendor is set up for EFT, the EFT will be removed until after the lien or garnishment is satisfied.</p>
Chg/W-9 Agency	<p>The three digit agency code is automatically filled in based on your user name and agency code entered when you logged on.</p>
1099 Name/Addr	<p>This is a one-character field that controls which address is used when printing the 1099MISC forms. Click on the down arrow and select the appropriate indicator:</p> <p>Y – Use this address for 1099 reporting. If there is only one suffix for this vendor, then use “Y”.</p> <p>Blank – There is another suffix that has already been identified as the address to use for 1099 reporting. STARS will not allow a second record with a “Y” to be added.</p>

Data Elements	Description
Sort Sequence	<p>The sort sequence is an identifier to help locate or sort vendors. It does not have to match the IRS/SSA Name. You might want to use the Business Name in the sort sequence field. For example, John Doe might be the IRS/SSA Name doing business as Arnolds Pig Farm (Business Name). The sort sequence could be ARNOLDSPIG. (See Vendor Information below.)</p> <p>Enter up to ten alphanumeric characters.</p> <p>Format – Do not use any special characters (hyphens, slash marks, etc.) in the sort sequence. Do not use “The”.</p> <p>Individual’s Name – Last names should be listed first. For example, SMITHJOHN is the sort sequence for John Smith.</p> <p>Abbreviations – Please see the examples of some common abbreviations in <a href="#">Sort Sequence &amp; State Abbreviations</a> section.</p>
<div>SS EIN Number</div> <div>Suffix</div>	<p>The nine-character SS EIN Number field will be automatically filled in based on the Vendor Number and is usually the same as the SSN or FEDERAL EIN number. This can be changed.</p> <p>However, if the Vendor Status is 2, the new Vendor Number/Suffix should be entered in this field in order for the 1099 Reporting system to combine the amounts together for tax purposes. The suffix is an optional two-character field.</p>
1099 Indicator	<p>Click on the down arrow and select the appropriate 1099 Indicator.</p> <p>Y – Yes, this is a 1099 reportable vendor.</p> <p>N – No, this is not a 1099 reportable vendor.</p> <p>The following vendor types are always an ‘N’:</p> <p>C – Corporation</p> <p>G – Government</p> <p>N – Non-profit</p> <p>E – State Employee</p>

Data Elements	Description
Web RA Indicator	<p>Click on the down arrow and select the appropriate Web Remittance Advice Indicator</p> <p>Blank – Default. Vendor does not want to view remittance advices on the web.</p> <p>0 – Vendor wants to view remittance advices for this suffix.</p> <p>1 – Vendor wants to view remittance advices for all suffixes on this vendor number.</p> <p>If either 0 or 1 is selected, then a phone number and a contact name will also be required.</p>

## VENDOR INFORMATION

Vendor Information:	
*IRS/SSA Name	<input type="text"/>
Business Name	<input type="text"/>
*Address	<input type="text"/>
*City	<input type="text"/>
*State	ID <input type="text"/>
*Zip Code   Ext.	<input type="text"/> <input type="text"/>
Phone Number   Ext.	<input type="text"/> <input type="text"/>
Contact Name	<input type="text"/>

Data Elements	Description
IRS/SSA Name	<p>Enter the name that is provided on the Combined Substitute Form W9 - which should be the name that the vendor uses to file taxes. Typically a sole proprietor's name should be in the IRS/SSA Name and the actual business name would be entered as Business Name. Punctuation is allowed only if it is an integral part of the name. Example: Jobs.com would require the use of the period as part of the identifiable name.</p>
Business Name	<p>If the DBA (doing business as) name is different from the IRS/SSA Name, then enter the DBA name here.</p> <p>If the vendor number looks like a social security number or is the number in the SSN section of the W9, there must be an individual's name in the IRS/SSA Name field.</p> <p>If both the SSN and business EIN are present, contact the vendor to see which is supposed to be used.</p>



<b>Data Elements</b>	<b>Description</b>
Address	Enter the street address or post office box number that was provided on the Substitute Form W9 or other vendor documentation. Do not use punctuation when adding addresses, even if using abbreviations.
City	Enter the city that was provided on the Combined Substitute Form W9 or other vendor documentation.
State	By default the State field is ID for Idaho. If the vendor is not in Idaho, select the appropriate state. If the vendor is outside the United States, select XX.
Zip Code   Ext	The five-digit zip code is required. The four-digit extension is not required. If the vendor is outside the United States, use "XXXXX" as the zip code.
Phone Number   Ext	If either 1 or 2 are selected as the Web RA Indicator, then the phone number is required.  If 0 is selected, then the phone number is optional but recommended and is useful if SCO personnel have questions. Enter the vendor's telephone number, including the area code.
Contact Name	If either 1 or 2 are selected as the Web RA Indicator, then the Contact Name is required. If 0 is selected, then the contact name is optional but recommended and is useful if SCO personnel have questions.

## TRACKING INFORMATION

<b>Tracking Information:</b>	
Submittal Status	
Comments:	
<b>Comment Log:</b>	
<a href="#">Save Draft</a> <a href="#">Send for Approval</a> <span style="float: right;"><a href="#">Print</a>   <a href="#">Close</a>   <a href="#">Help</a></span>	

Data Elements	Description
SUBMITTAL STATUS	When creating the form, this section will be blank. When viewing a previously created form, this section will tell you the current status of the form. For additional information on submittal status, see <a href="#">View Vendor Forms in Progress</a> .
COMMENTS	Use this free formatted field to communicate any additional information that SCO personnel might need to review or verify this form. Be aware that any entries in this field will become part of the tracking record for the form and should not be viewed as or used for personal communication with any SCO personnel.
Comment Log	The comment log is the history of any and all comments recorded in the comments field described above. The comment log will allow both SCO and agency personnel the ability to track any needed information or clarifications that have been requested or provided.

## SAVE, SEND FOR APPROVAL, OR PRINT THE FORM

To save, send for approval, or print a form, choose one of the following at the bottom of the **Vendor Form** screen:

- **Save Draft** – Use this option when you have started a vendor form and discover that you are not ready to submit to the SCO for approval.
- **Send for Approval** – Use this option when you have completed the form and it is ready to be sent to the SCO for approval. After clicking “Send for Approval”, you will see the message, “Form Transmitted – Loading New Form” for a few seconds. Once the form has successfully transmitted, the application will display a new vendor form.
- **Print** – Use this option if you want a printed copy of your submittal. Keep in mind that any form that is sent for approval or saved as a draft will appear on the View Vendor Forms in Progress screen. The need to print should be minimal.

- **Close** – Use this option to close the vendor form. Be sure to either save your form as a draft or send the form for approval before closing. Closing before saving or sending will result in any entered information being lost.
- **Help** – Use this to view the Vendor Chapter of the STARS Manual.

## VIEWING VENDOR FORMS IN PROGRESS (BY AN AGENCY)

Click **View Vendor Forms in Progress** and the following screen will display:

VENDOR FORMS IN PROGRESS				
REQUEST DATE	REQUESTING AGENCY	VENDOR NAME	VENDOR NBR	STATUS
06/18/2004 02:14:59	140-CONTROLLER	SIM TEST 2	987789369-	Draft
06/21/2004 01:13:09	140-CONTROLLER	TUES TEST	789654123-	Awaiting Approval
06/21/2004 01:13:09	140-CONTROLLER	UNLOCK TEST 5	789654123-	Disapproved
06/21/2004 01:13:09	140-CONTROLLER	UNLOCK TEST 6	789654123-	Disapproved
06/21/2004 01:13:09	140-CONTROLLER	UNLOCK TEST 7	789654123-	Awaiting Approval
06/22/2004 09:50:43	140-CONTROLLER			Draft
06/22/2004 12:20:23	140-CONTROLLER	LOCK DOC	-	Draft
07/23/2004 08:23:04	140-CONTROLLER			Draft
07/23/2004 08:24:03	140-CONTROLLER	BLAH BLAH BLAH	123456789-00	Awaiting Approval
09/27/2004 01:31:15	140-CONTROLLER	WATTYKINS	987456321-01	Pending Agency Edits

Agency personnel will only be able to view those vendor forms that they created. To view a form, double-click the line. Any form listed in this view can be updated and re-sent for approval – except those with a status of Disapproved. The forms are listed in order of the day and time of the request.

The **STATUS** column can display any of the following:

- Awaiting Approval** – A previously submitted form that is waiting for SCO verification, review and approval.
- Disapproved** - Disapproved forms will remain in the Vendor Forms in Progress view for three days. After that time, agency personnel will not be able to view or access the disapproved forms. While in a Disapproved Vendor Form, you have the options of deleting, printing, closing or accessing the help function. The reasons for disapproving a form are listed below:
  - Numerous attempts at obtaining the correct information have failed.
  - Form has remained in “Pending Agency Edit” status for over a month. If the needed information is received after the form has been disapproved, the agency employee must complete and submit a new form.
  - The agency employee tells SCO to disregard the vendor form but not delete it.
- Draft** – A previously created vendor form that was saved as a draft and has not yet been submitted for approval.

- d. **Pending Agency Edits** – A previously submitted form that was unsuccessful in completing the SCO verification, review and approval process and has been returned to the originating agency employee. When a form is returned, an email notification is sent with an explanation of why it is being returned. The explanation will be in both the email notification and will display in the Comment Log of the web form. After the agency employee has updated the form, it can be re-sent for approval.
- e. **Pending STARS Update** – A previously submitted form that has successfully completed the SCO verification, review and approval process, but has not yet been loaded into STARS.

To view a form, double-click the line. The **Comment Log** will show the comments leading up to the current status. While in a form, the following options may be available:

- **Save Draft** – Use this option when you have altered a previously submitted vendor form and discover that you are not ready to re-submit to the SCO for approval. Not available if the Status is “Disapproved.”
- **Send for Approval** – Use this option when you have completed the changes and it is ready to be re-sent to the SCO for approval. After clicking “Send for Approval”, you will see the message, “Form Transmitted – Loading New Form” for a few seconds. Once the form has successfully transmitted, the application will display a new vendor form. Not available if the Status is “Disapproved.”
- **Delete** – This action is used when agency and SCO personnel have agreed that the submitted vendor form needs to be deleted for some valid reason.
- **Print** – Use this option if you want a printed copy of your submittal. Keep in mind that any form that is sent for approval or saved as a draft will appear on the View Vendor Forms in Progress screen. The need to print should be minimal.
- **Close** – Use this option to close the vendor form. Be sure to either save your form as a draft or send the form for approval before closing. Closing before saving or sending will result in any entered information being lost.
- **Help** – Clicking on this option will take you to the Vendor Chapter of the STARS Manual.

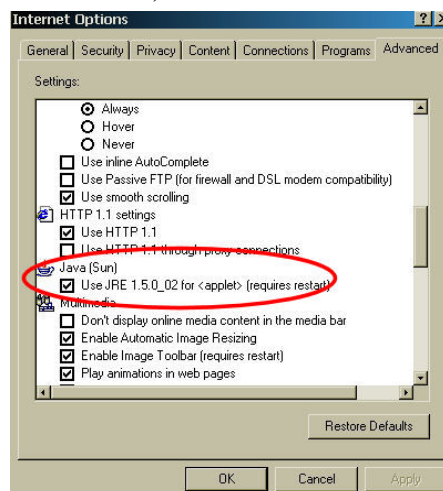
## E-MAIL NOTIFICATION

Every time SCO personnel select **Approve**, **Disapprove**, **Pend for Agency Edits**, or **Pend for STARS Update**, the originating agency personnel are notified by e-mail of the action. The e-mail includes any messages that may have been added to the Comments section of the form.

## TROUBLESHOOTING WEB BROWSER REQUIREMENTS

For the Vendor Maintenance Application to run properly, Java Applets must be enabled in your browser. The example below demonstrates enabling Java in Internet Explorer:

1. Open your Internet browser (e.g., Internet Explorer).
2. Click **Tools** (in the menu bar at the top).
3. Click **Internet Options**.
4. Click **Advanced**.
5. Scroll down to either a **Java (Sun)** or a **Microsoft VM** heading. (In IE, following the **HTTP** heading).
6. Depending on which Java virtual machine you have, make sure there is a checkmark next to either the "Use JRE..." option or both "**Java logging enabled**" and "**Java console enabled**" options.
7. Click **OK**. (You may have to close your browser and re-open it for the change to take effect.)




## AGENCY RESPONSIBILITIES

Agency employees have the responsibility of obtaining the Substitute form W9 and entering the information into the Web Vendor Maintenance application. Agencies should keep the Substitute form W9. Agencies are responsible for following their internal control policies to ensure that vendors and vendor information are appropriate.

## SCO RESPONSIBILITIES

SCO personnel perform the verification, review and approval process on forms from all agencies. SCO personnel will verify that the submitted vendor name/number combination matches either IRS information or SSA information and review forms for completeness and reasonableness of information. Like agencies, SCO personnel select **View Vendor Forms in Progress** :

 <a href="#">Vendor Form</a>	<a href="#">View Forms Pending Agency Edits</a>	<a href="#">View Complete Forms</a>	<a href="#">View Disapproved Forms</a>	<a href="#">Applications</a>	<a href="#">Log Off</a>
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VENDOR FORMS IN PROGRESS					
<a href="#">&lt;--- Previous</a>		<a href="#">Next ---&gt;</a>			
REQUEST DATE	REQUESTING AGENCY	VENDOR NAME	VENDOR NBR	STATUS	
02/03/2005 10:20:18 AM	240-COMMERCE AND LABOR	FORTIS INSURANCE	390658730-01	Awaiting Approval	
02/07/2005 11:38:15 AM	240-COMMERCE AND LABOR	CRICKET COMMUNICATIONS	330879924-03	Awaiting Approval	
02/11/2005 01:09:09 PM	260-FISH & GAME	AAA TRAVEL	930243420-	Awaiting Approval	
02/11/2005 01:12:54 PM	260-FISH & GAME	LAURIE MAUSER	519583969-	Awaiting Approval	
02/11/2005 01:15:09 PM	260-FISH & GAME	PRODUCERS SUPPLY CO-OP	820218561-	Awaiting Approval	

The **STATUS** column can display any of the following:

- **Draft** – A previously created vendor form that was saved as a draft and has not yet been submitted for approval.
- **Awaiting Approval** – A previously submitted form that is waiting for SCO verification, review and approval.
- **Pending STARS Update** – A previously submitted form that has successfully completed the SCO verification, review and approval process, but has not yet been loaded into STARS.

SCO personnel will review the following:

- Does the submitted name/number match IRS or SSA records?
- If the vendor number looks like an SSN, is there an individual's name listed as the IRS/SSA Name?
- Does the Sort Sequence make sense for the IRS/SSA Name or Business Name and does it follow the abbreviation conventions?
- Is the vendor *number* already on STARS? If not, use 00 as the vendor suffix. If yes, the next available sequence number will be used.
- Is the vendor *name* already on STARS? If not, then the name/number combination should be okay to use. If yes but the form has a different number, then additional research will be done to determine the proper vendor status of the existing vendor number.

Based on this analysis, SCO personnel can select any of the following actions on the Vendor Maintenance application:

<b>Menu Item</b>	<b>Function</b>
Save Draft	SCO personnel can make changes and take no other action at that time.
Pending Agency Edits	<p>If the form needs to be returned to the originating agency employee for some reason, SCO personnel would select this option. Anytime a form is returned, an email notification is sent to the email address provided on the form. A message will appear in the body of the email that explains why the form is being returned.</p> <p>The same message will appear in the comment log area of the vendor form.</p> <p>After selecting this action, the form remains on the View Vendor Forms in Progress Screen and can be edited by either the originating agency employee or SCO personnel.</p>
Approve	<p>If the vendor form passes all the verifications and reviews <i>and</i> the information has been loaded in STARS, then SCO personnel would select this action.</p> <p>After selecting this action, the form is locked and removed from the <b>View Vendor Forms in Progress</b> screen and is placed on the <b>View Completed Forms</b> screen that is accessible by SCO personnel only. Agencies will be automatically notified by e-mail that the vendor is available.</p>
Disapprove	<p>The reasons for disapproving a form include:</p> <p>Numerous attempts at obtaining the correct information have failed.</p> <p>Form has remained in “Pending Agency Edit” status for over a month. Afterwards, the agency employee must complete and submit a new form.</p> <p>The agency employee tells SCO to disregard the vendor form.</p> <p>After selecting <b>Disapprove</b>, the form is locked and removed from the SCO’s <b>View Vendor Forms in Progress</b> screen and is placed on the <b>View Disapproved Forms</b> screen, accessible by SCO only.</p> <p>Disapproved forms remain on the agency’s <b>View Vendor Forms in Progress</b> view for 3 days. Agencies will be automatically notified by e-mail that the vendor will not be added to STARS.</p>

<b>Menu Item</b>	<b>Function</b>
Pending STARS Update	Use this action when the vendor form has passed all of the verifications and reviews, but has not been loaded in STARS. After selecting this action, the form remains in the View Vendor Forms in Progress screen.
Delete	This action is used when agency and SCO personnel have agreed that the submitted vendor form needs to be deleted for some valid reason.
Print	Use this to print a copy of your submittal. Since all forms are saved in the application somewhere (except the deleted ones), the need to print should be minimal.
Close	Use this to close the vendor form. Be sure to either save your form as a draft or take some other action before closing. Closing before saving or taking another action will result in any entered information being lost.
Help	Use this to open the Vendor Chapter of the STARS Manual.